Windrose Advisors
Watermill Center
800 South Street, Suite 600
Waltham, MA 02453

Associate – Investment Team - Work within the Investment Team, acting as a generalist to support portfolio management for all asset classes, including public and private markets, with a focus on fixed income and credit investing, using a variety of tools and technologies including Bloomberg, FactSet, Excel, and PowerPoint. Duties include:

- Performing due diligence, research, and ongoing monitoring related to current and prospective investment managers. The primary focus will be traditional liquid strategy, but assignments will range across all asset classes, including hedge funds, private equity, options, and derivatives.
- Analyzing investment portfolios, performance, and risk exposure, including historical performance, volatility, drawdown, sector weightings, portfolio composition, Brinson attribution, and contributors/detractors.
- Developing quantitative models using Python and other software tools to identify hedge fund risk exposure and select managers.
- Attending current and prospective manager meetings.
- Assisting with the production of manager recommendations for the firm’s investment committee.
- Developing and updating periodic manager reports and overviews, including reports to summarize manager performance.
- Maintaining portfolio transparency data and look-through aggregation reports.
- Producing white papers and thought pieces on a variety of investment topics.
- Developing an understanding of performance attribution and working with the client service team to apply that knowledge and ensure client reports are accurate and up-to-date.
- Working with the Investment Team on transition plans and asset allocation plans for clients and prospects.
- Preparing presentations for client and prospect meetings.
- Completing analytical projects related to platform portfolio investments.
- Completing ad hoc projects as needed.
- Working independently and as part of a team depending on project requirements, and working on multiple key projects simultaneously, prioritizing tasks to meet all deadlines.

Position requires: (1) Master’s degree with a finance, business, or quantitative major. Coursework must include at least 16 credits in investment topics such as fixed income securities, options and derivatives, private equity, and portfolio management. (2) 12 months of experience in an investment and/or financial business analyst position, to include at least 6 months of each of the following: a) Analyzing investment portfolios, performance, and risk exposure, including historical performance, volatility, drawdown, sector weightings, portfolio composition, Brinson attribution, and contributors/detractors. b) Developing quantitative models using Python and other software tools to identify hedge fund risk exposure and select managers. c) Developing reports to summarize manager performance. d) Using tools and technologies including Bloomberg, FactSet, Excel, and PowerPoint. e) Working on multiple key projects simultaneously, prioritizing tasks to meet all deadlines. f) Working independently and as part of a team. (3) Successful completion of drug test and background check. (4) Local and national travel approximately 20% of worktime to attend portfolio manager meetings and industry conferences.